

DATE: August 24, 1999

TO: CLSA Non-Public Libraries Participating in Library of California  
Interlibrary Loan Pilot Program as of July 31, 1999

FROM: Tom Andersen  
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SUBJ: Update on Interlibrary Loan Pilot Program

The Library of California Board has authorized expanding the interlibrary loan pilot program to include all California libraries meeting the *Library of California Interim Eligibility Standards* (enclosed). Beginning September 1, 1999, you may now request reimbursement for loans to libraries that are not eligible under CLSA but *are* eligible under the Library of California; these include libraries within for-profit institutions and non-institutional government libraries. Please see the enclosed eligibility guidelines for more information. Beginning September 1, reimbursements to non-public libraries for *all* interlibrary loans will be paid out of Library of California funds.

The Board has allocated funds for the expanded pilot program through June 2000. It is unknown at this time if the pilot program will be extended into the 2000/2001 fiscal year or if it will become a permanent access services program under the Library of California. The Board may also discontinue the program at any time. Also, since the Library of California budget allocation may not be sufficient to cover the full cost of all transactions for the expanded pilot program, reimbursements will be prorated. 20% of the payment will be withheld from each valid claim, so that quarterly reimbursements will be made at 80% of the total cost. When costs are known for the entire year, a fifth payment will be made to reimburse participants at a higher percentage, providing funds remain in the budget. This process duplicates the method used to prorate ILL reimbursements to public libraries.

The expansion of the pilot program has required changes in the ILL Transaction Report/Claim form. The major change in the new form is that all special library categories have been combined into one. **Please begin using the new ILL Transaction Report/Claim form beginning September 1, 1999; submit your July and August reports on the old form that was supplied when you signed up for the pilot program.**

Also, beginning October 1, 1999, you will *not* be required to submit monthly reports. Instead, the State Library will collect ILL data on a quarterly basis; the new Report/Claim form reflects this change. Forms will still be due in the Budget Office **no later** than the 15<sup>th</sup> of the month following the end of the reporting period. **After you submit your September report (using the new form), the next report you submit (by January 15<sup>th</sup>, 2000) will be the second quarter report (October, November, December 1999).**

You will need to fill in the following information for each report:

- 1) Library Name and Library Account Number. If you do not know your Library Account Number, please call Cindy Tackett at (916) 653-4192 or Sue Whitehead at (916) 653-4033 in the State Library's Budget Office.
- 2) Reporting Period - You should check off the quarter which is represented by the data that is being returned, e.g., January-March data is the third quarter (reporting is on a fiscal year basis).
- 3) Make sure the form is signed; this is your legal claim for ILL reimbursement. Please remember that if you are charging a handling fee, you are not entitled to claim the transaction. Your signature acknowledges your understanding of this.
- 4) In the middle of the form you will notice three boxes under each category of loans. For those libraries who choose to track monthly data, there is one box for each month in the quarter. **Libraries are only required to fill in the total quarterly data section on the far right. Monthly recording of data is a library option.**

Interlibrary loan pilot program eligibility guidelines are enclosed. If you have questions, please contact me at (916) 653-7391 (e-mail: [tanderse@library.ca.gov](mailto:tanderse@library.ca.gov)) or Sandy Habbestad, CLSA Program Analyst, (916) 653-7532 (e-mail: [shabbest@library.ca.gov](mailto:shabbest@library.ca.gov)).

The four claim forms enclosed are intended to be a full year's supply, but should anyone need more forms, feel free to copy them or contact us and we will send you additional forms.

For your information, the Library of California Board has requested a study of the costs of providing interlibrary loan and direct loan services in California's multitype library environment. As part of this process, the consultants working on the study will be polling a small group of California libraries to assess the current funding situation and to test some potential options. Your library may be asked to participate in this poll. Contact Tom Andersen for more information.

If you have any questions, feel free to call.

TA/users/LoC Loan/LoC ILL expanded pilot CLSA non-public participants memo